

Characterizing the Multifamily Market -- Lessons Learned and Best Practices

*Jeannette LeZaks, Energy Center of Wisconsin
Tom Syring, Franklin Energy Services, LLC*

Introduction

This poster presents the best practices and lessons learned from a field study which characterized the Minnesota multifamily rental housing market. The Minnesota Department of Commerce Division of Energy Resources funded this characterization with the objective of understanding the multifamily market more deeply since up until this time, no comprehensive characterization of the Minnesota multifamily housing market had been conducted. Our goals for the study were to provide a statistically representative picture of the building characteristics, appliances and equipment in the Minnesota rental housing stock and assess energy efficiency opportunities. We conducted walk-through audits for 120 multifamily properties with in-field monitoring in a limited number of buildings. In addition, we explored the knowledge, attitudes and behavior of building tenants, owners and managers through surveys.

Lessons Learned

Because the scope of this project was large and involved many moving parts, we thought it would be beneficial to present some of the challenges we faced in conducting a large-scale field-based characterization study and describe the lessons learned in hopes that others may apply what we garnered in future projects. We offer two overarching lessons learned followed by specific issues that we encountered.

Overarching Lessons Learned:

- 1) **Use a customer relationship management (CRM) system to track data from the very beginning of the project to organize and manage complex relationships.** The participant recruitment process can be complex and requires many touch-points from first calls to final follow-ups. Having a CRM system would provide the depth of data needed to manage and build the relationships for study recruitment.
- 2) **Use a tablet-based field data collection system to simplify data collection and data analysis.** While we did not use a tablet-based system, we felt that such tools available today offer a streamlined approach to capturing large amounts of data, both for data collection in the field and for analysis out of the field.

Building Participant Recruiting

Issue: Very low response to cold-calling via telephone. We seldom reached the decision maker in one call and the customers almost always asked for information to be sent. It was necessary to re-contact numerous times before answer received (yes or no)

Solutions: We found that we needed to approach recruitment from a number of angles, not simply through cold-calling:

- a. Direct mail to introduce program (received some response)
- b. Follow-up telephone call
- c. Email information (person often missed postcard)
- d. Follow-up telephone call (repeat until answer received)

Primary lesson: It was necessary to develop a relationship with the building owner or manager before most would agree to participate, which required many touch-points to recruit a participant.

Participant Site Visit Coordination

Issue: We encountered no shows for on-site data collection. Early on, building managers would schedule for representatives to meet the energy advisor. Several did not show.

Solution: Cell phone contact with the on-site representative must be made several days prior to the visit, and the day prior to the visit.

Primary lesson: More contact is always better, and contact with the person you are meeting is essential.

Tenant Participation

Issue: Needed to motivate tenant to respond to surveys and complete a utility release form. Since the utility release form was required to be in paper format, we also wanted to make it easy for tenants to send in the form in addition to filling out the survey.

Solution: We offered cash incentives to those tenants that sent in both a survey and their utility release form. We created a graphically pleasing cover-letter to motivate a tenant to pick up the survey packets.

Primary Lesson: Offer respondents multiple modes of providing feedback and make it easy to send the information back to us. We gave the option for submitting either online or paper surveys, but we still provided business-reply envelopes so they could simply drop the utility release form in the mail to send it back.

Field Data Collection

Issue: The data collection forms were complex and we asked the field technicians to fill out a lot of information in a little amount of time.

Solution: We accompanied the field technicians on site visits to ensure that data collection was thorough. However, recognize that since every building has its own quirks, there will be unforeseen challenges that may come up on other site visits.

Primary Lesson: Always conduct test walk-through audits to ensure everyone is on the same page. Be sure to highlight the prioritization of data collection and emphasize when to double check with analyst on questions on the field form. Oftentimes, this means more up-front planning than is typically allocated. And to reiterate an overarching lesson learned, a tablet-based data collection system would allow for simple and timely quality control of incoming data.